



COUNTY OF SAN DIEGO

**Great Government Through the General Management System – Quality, Timeliness, Value**  
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

HUMAN SERVICES SPECIALIST

Class No. 005223

■ CLASSIFICATION PURPOSE

To perform technical work in determining eligibility for clients who are applying for several categorical forms of public assistance for governmental and community services and programs; and to perform related work as required.

■ DISTINGUISHING CHARACTERISTICS

This is the journey level class in the Human Services Specialist series. Upon successfully completing a formal in-house training program and demonstrating competence in performing the functions of this class, incumbents work under general supervision and are expected to independently perform technical work in determining eligibility for clients who are requesting assistance provided by governmental and community services and programs. Incumbents are assigned to varied programs and work locations within the Health and Human Services Agency (HHS).

■ FUNCTIONS

**The examples of functions listed in the class specification are representative but not necessarily exhaustive or descriptive of any one position in the class. Management is not precluded from assigning other related functions not listed herein if such duties are a logical assignment for the position.**

Essential Functions:

1. Provides services to members of the public by personally responding to requests for service or making appropriate referral.
2. Conducts personal interviews with clients to obtain, clarify, and verify financial, demographic, medical, and other information to determine eligibility for financial, health, and medical assistance and services.
3. Reads, interprets, and explains regulations, requirements, legal rights, and responsibilities to clients; receives and responds to questions and complaints from clients and representatives from outside agencies.
4. Obtains or retrieves financial, demographic, medical, personal, and other information used to determine initial or continuing eligibility for federal, state, and county programs; reviews and verifies information provided by clients and other sources for accuracy and completeness.
5. Evaluates documentation provided by clients and determines if clients meet eligibility requirements based on rules and policies.
6. Computes amounts of financial and medical assistance and benefits available to clients and communicates results to clients.
7. Determines and issues benefits based on information provided by applicants or recipients, and information from other sources.
8. Uses specialized computer applications to enter and retrieve information, process eligibility determinations and benefit levels, issue notices, schedule appointments, prepare correspondence, prioritize work, or perform other relevant tasks.
9. Enters data and updates automated records and files pertaining to client information such as renewals, income, expenses, and personal and demographic information; completes forms, notices, and documents required to certify or deny eligibility for public assistance programs; processes and updates automated and manual eligibility records in accordance with established guidelines.
10. Provides detailed explanations to clients on how and where to obtain services, benefits levels, and applicable share of costs; assists customers by facilitating enrollment in health programs and explaining instructions, laws, rules, and regulations.
11. Interacts with representatives of County departments and outside agencies to verify eligibility data, clarify discrepancies, obtain or provide information, and explain rules, regulations, policies, and procedures.

12. Maintains the security of files, records, and documents, and ensures that information contained in such files and records is kept confidential.
13. Prepares statistical reports and client correspondence.
14. Stays current on new and revised federal, state, and county legislation, laws, rules, regulations, policies, and procedures pertaining to assistance programs available from governmental and community service agencies; participates in conferences, seminars, and formal training sessions on topics such as public assistance programs.
15. Attends meetings and training sessions at a variety of locations.
16. May assist other employees by providing training, support, and mentoring; and may review co-workers' determinations for eligibility such as overpayment reviews and case transfers.

#### ■ KNOWLEDGE, SKILLS, AND ABILITIES

##### Knowledge of:

- Basic operation and use of computers using a windows-type operating system.
- Computer software programs such as databases, word processing, spreadsheets, and electronic communications.
- County customer service objectives and strategies.
- Telephone, office, and online etiquette.
- Methods and techniques used to conduct effective and in-depth personal interviews with clients and members of the public.
- Methods and techniques used to collect, compile, and organize information and data.
- Principal sources of information necessary to establish eligibility for several types of aid programs.
- Eligibility requirements for a variety of programs that provide financial coverage for clients.
- Concepts pertaining to client advocacy.
- Special needs of clients who are applying for financial and medical assistance.
- Community resources available to meet the needs of clients with financial and medical needs.
- Confidentiality and privacy laws, rules, regulations, and procedures pertaining to record keeping and disclosure activities.

##### Skills and Abilities to:

- Use specialized computer applications on a daily basis to complete tasks or assignments, and prioritize work.
- Use specialized computer applications while conducting interactive interviews with clients in order to process all factors or information for determining clients' eligibility for benefits.
- Accurately determine and issue benefits based on information provided by applicants or recipients, or other informational sources.
- Pay close attention to detail when updating and accurately maintaining records and documents, reviewing and verifying information, and resolving errors and discrepancies discovered in the course of work.
- Actively participate in training sessions in order to learn and understand the laws, rules, regulations, policies, and procedures pertaining to HHSA programs, services, and activities.
- Follow verbal and written instructions accurately and correctly.
- Effectively interview and gain the cooperation of clients in a variety of settings in order to obtain complete and accurate information.
- Collect, compile, review, and organize information in a logical fashion.
- Read, understand, and interpret information and data found in applications and other technical documents.
- Organize, prioritize, and complete a large volume of work within strict time deadlines.
- Perform basic mathematical calculations accurately and correctly and be accountable for such calculations.
- Communicate effectively in written form in order to complete forms and notices and to prepare reports, correspondence, and written summaries.
- Communicate effectively with a variety of individuals representing diverse cultures and backgrounds and function calmly in situations, which require a high degree of sensitivity, tact and diplomacy.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or referral.
- Provide prompt, efficient and responsive service.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.
- Maintain confidentiality of files and records that are considered personal and sensitive in nature.
- Use modern office equipment, such as personal computers, calculators, copy machines, facsimiles, telephones, and file cabinets in a safe and efficient manner.

## ■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. An example of qualifying education/experience is: at least two years of full time experience performing public contact work on a daily basis which must have included (1) interviewing persons and performing general clerical duties; OR (2) providing direct delivery of human services to clients; OR (3) processing documents related to personal or financial histories of clients or members of the public. Previous education or experience must have included demonstrating knowledge of the basic operation and use of computers using a windows-type operating system.

**Note:** The possession of an Associate Degree from an accredited college or the successful completion of two years of coursework from an accredited college or university will substitute for the experience requirement stated above.

## ■ ESSENTIAL PHYSICAL CHARACTERISTICS

**The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classification. Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.**

Continuous upward and downward flexion of the neck. Frequent: sitting, pushing and pulling file drawers and carts, reaching above and below the shoulders, lifting and carrying case files and other office items weighing up to 25 pounds, and repetitive use of the hands to use computers and office equipment and perform simple and power grasping. Occasional: standing, walking, and kneeling.

## ■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

### License

A valid California Class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment or the ability to arrange necessary, timely transportation for field travel. Employees in this class may be required to use their personal vehicle.

### Certification/Registration

None required.

### Working Conditions

Work primarily takes place in an office environment and involves daily exposure to computers. Some positions may be assigned to travel to outside agencies, medical facilities, and the homes of clients. Incumbents occasionally have difficult interactions with individuals who may be ill, homeless, or under the influence of alcohol or drugs.

### Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

### Probationary Period

Incumbents appointed to permanent positions in this classification shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).

**New: February 20, 2003**

**Reviewed: Spring 2003**

**Revised: June 8, 2004**

**Revised: April 25, 2005**